

Telephone Instructions for Avaya IP Remote Agents

Automatic Call Distribution -- An Automatic Call Distribution (ACD) system allows incoming calls to be evenly distributed amongst available telephone agents. The system will route callers to agents based on agent availability and the length of time that an agent has been waiting for a call. An ACD system requires agents to activate features to notify the system of an agent's status for answering calls. The remote ACD functionality allows telephone agents to answer calls from a remote location as opposed to the standard co-located office environment. As a remote agent, your PC will be setup with the software to allow you to answer calls from the ACD. The remote system will utilize your existing telephone line to make the connection to the ACD and then require the telephone agent to utilize the "soft" telephone on the PC to answer calls from the ACD. The telephone agent is unable to receive another ACD call while the agent is active on an ACD call.

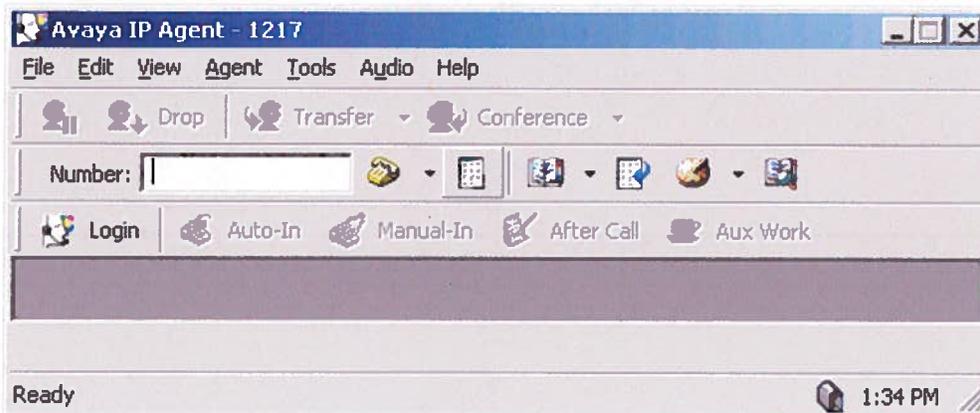
LOGGING IN

The ACD LOGIN feature notifies the system that the agent has arrived but is **not** ready to answer calls. **Agents must Login to the Server/PBX and then Login to the ACD.**

TO LOGIN TO THE SERVER: CLICK on the **AVAYA IP Agent** icon.

The system will then log the agent into the server. The PC screen will display the IP Agent telephone number at the top in the blue banner.

To login to the ACD click on the **Login** button.

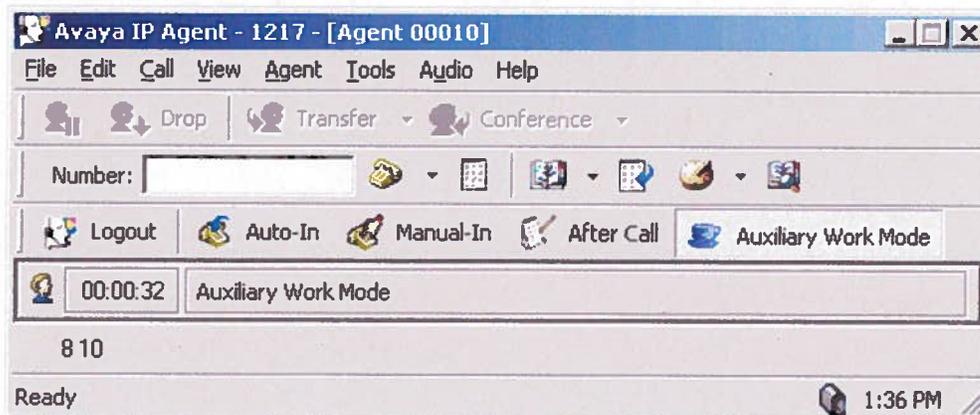


This screen is where you enter your Agent profile number. Once this is entered the system will remember it for future logins. No password is required so leave this space blank. Click the **Login** button.



The image shows a dialog box titled "Agent Login". It contains the text "Please enter your agent number and password...". There are two input fields: "Agent:" with the value "00010" and "Password:" which is empty. At the bottom, there are two buttons: "Login" and "Cancel".

The ACD functions will be highlighted and the Tool Bar in the center of the screen will light up. Also, when the agent initially logs in, the system automatically puts the agent into the **Auxiliary Work Mode**. This is an unavailable mode that does not allow calls to ring to the agent.

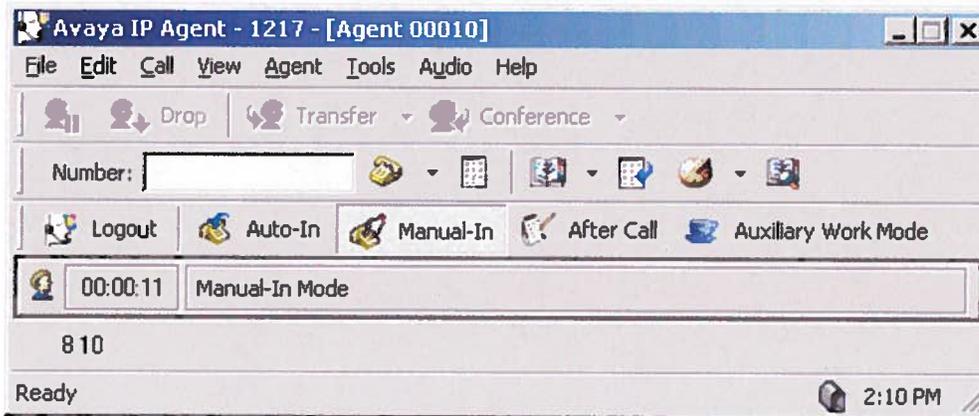


Answering Calls

When the agent is ready to receive an incoming call from the ACD, the system needs to be notified that the agent is available and calls should be routed to the agent for processing.

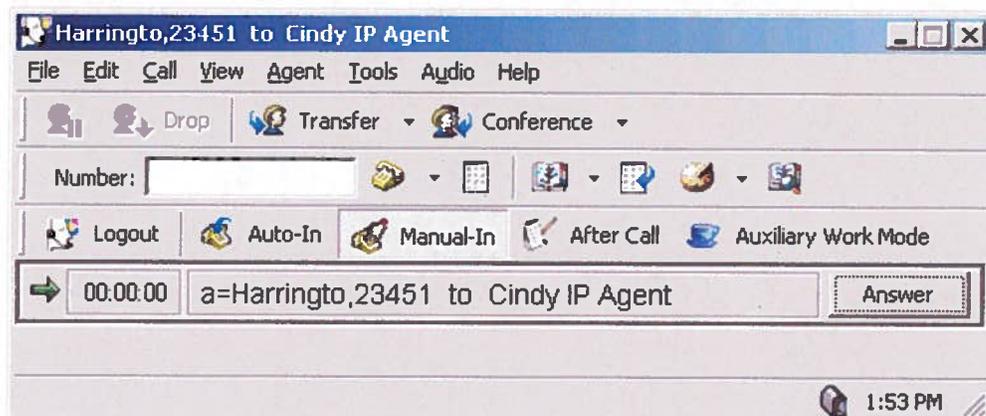
TO NOTIFY THE SYSTEM THAT THE AGENT IS READY TO TAKE CALLS FROM THE ACD:

Click on **Manual-In or Auto-In.** The agent is now available to receive ACD calls.

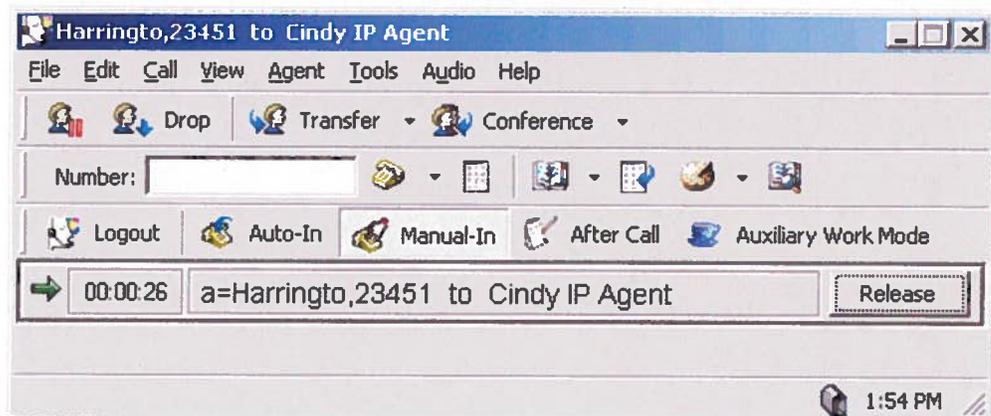


When a call is sent to you from the ACD, the system will ring once or twice at the agent's computer and then ring at the telephone.

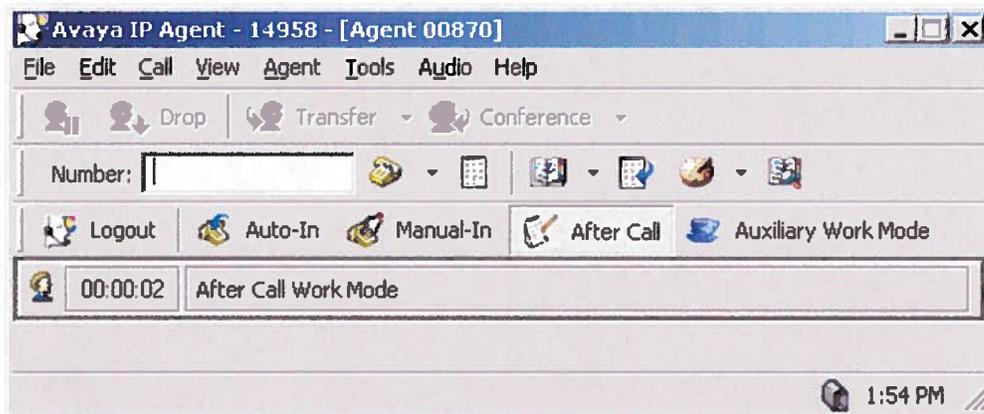
When the telephone rings use the handset or headset on your desk telephone to answer the call and speak with the caller. Using the computer mouse, click the **Answer** button on the IP Agent.



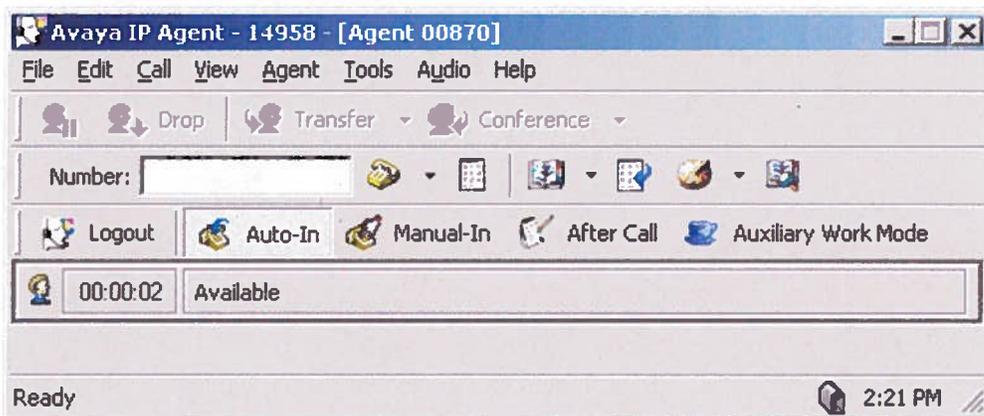
After the call is completed, click the **Release** button.



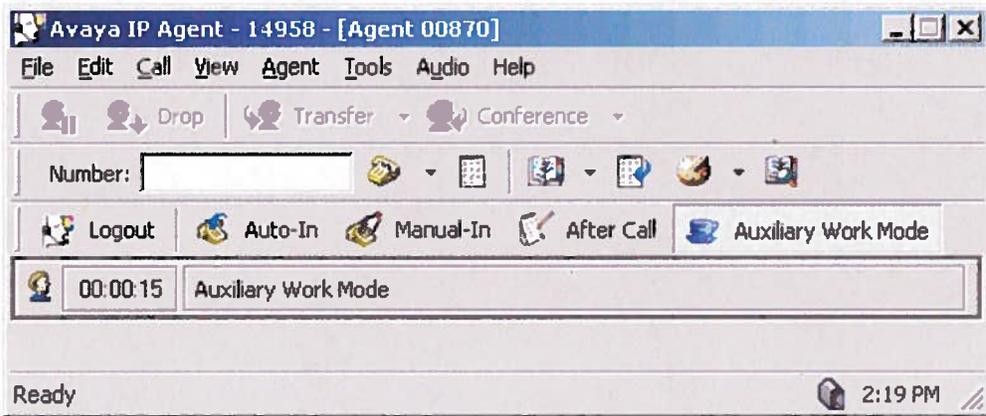
When using Manual-In, the IP agent will automatically put the agent in the unavailable mode of **After Call**. The supervisor reporting system will show the time it takes to complete documentation after a client call has been completed.



If the agent chooses **Auto-In** to take a call, the system will put the agent back into Auto-In when the call is released. The system will then automatically route calls to the agent as needed.



If an agent is scheduled to not be available for other reasons, i.e. break, meeting, or other work, click on the **Auxiliary Work Mode** button while on the last call the agent will be taking, to make sure another call does not ring through. This will not disrupt the call the agent is currently talking on.



To put a call on hold, click on the picture of the person with 2 red lines.



To get back to the caller, click on the **Reconnect** button.

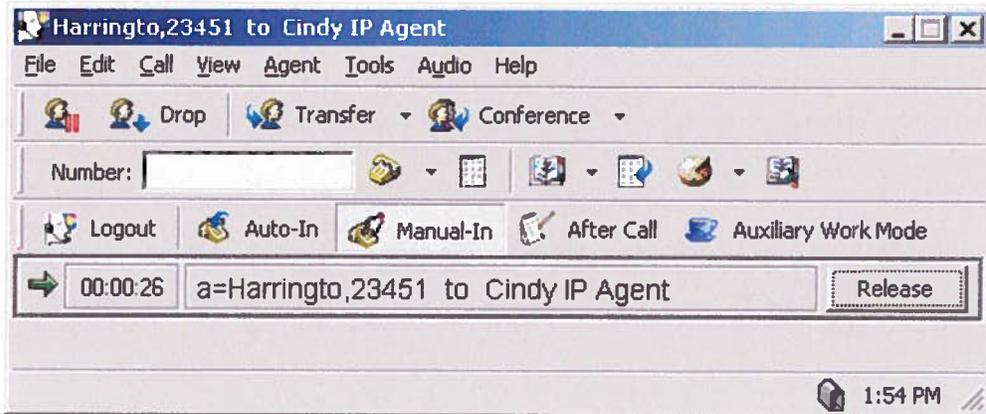


Transferring and Conferencing Calls

Caution: Transferring calls should be limited since the IP Agent dial tone comes from another location than the office you are working in. This process ties up circuits which can cause new callers to not be able to get answered and can lock up the systems. Also, SCAN long distance may need to be used to complete the transfer.

1. If the agent needs to transfer the caller to another extension the procedure is:

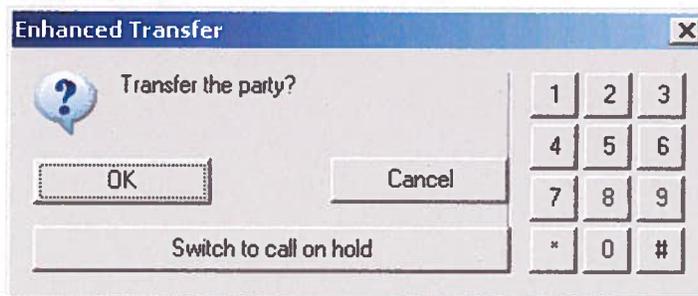
a) Click on the **Transfer** button.



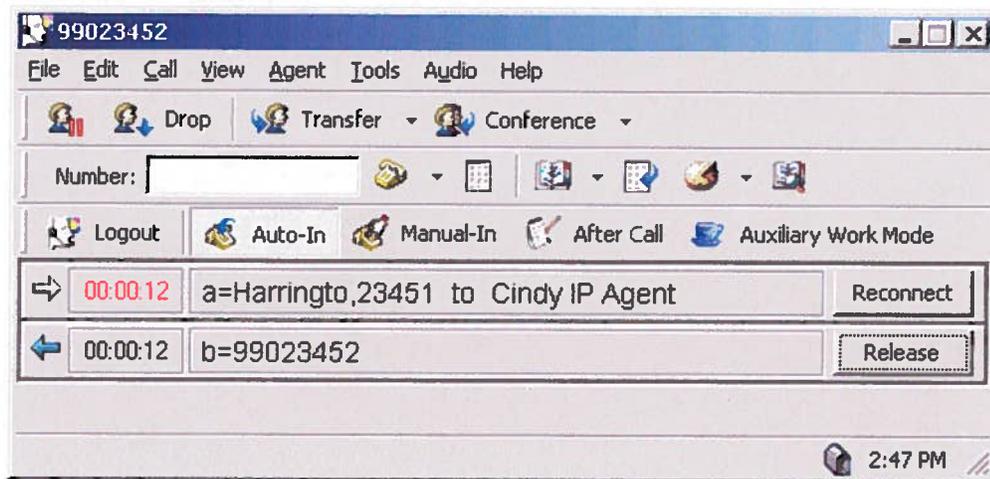
b) In the **Enhanced Transfer** box, enter the number the agent wishes to transfer the caller to. (The number must be typed in from the PC keyboard or it can be copied and pasted in from the directory.)



c) Click **OK**. The caller will be put on hold and the agent will see a **Transfer The Party** box.



- d) Remain on the line. If the number dialed is answered, announce the call, then click the **OK** button in the box. If the number dialed is not answered or is busy, click the **Cancel** button, then click the **Release** and **Reconnect** buttons to return to the caller on hold.

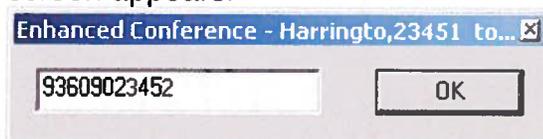


- e) When finished with the caller, click on the **Drop** or **Release** or hang up.

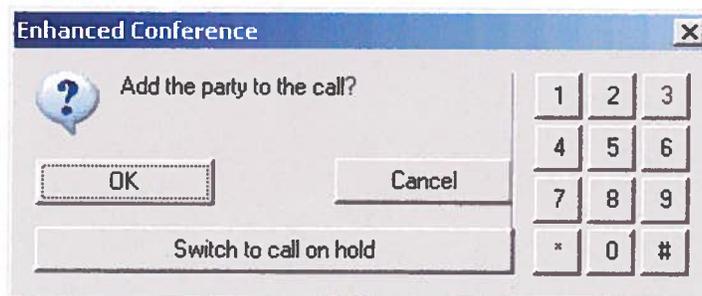
The Voice Connection Line will not disconnect immediately, but will require from 10 to 12 seconds to accomplish. (This is inherent with the Avaya IP Agent product)

2. If the agent needs to conference the caller with others the procedure is:

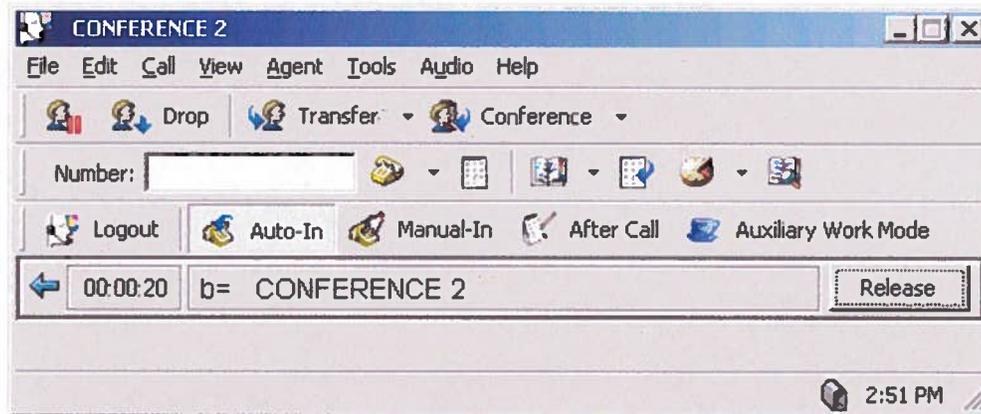
- a) Click on the **Conference** feature and the **Enhanced Conference** screen appears.



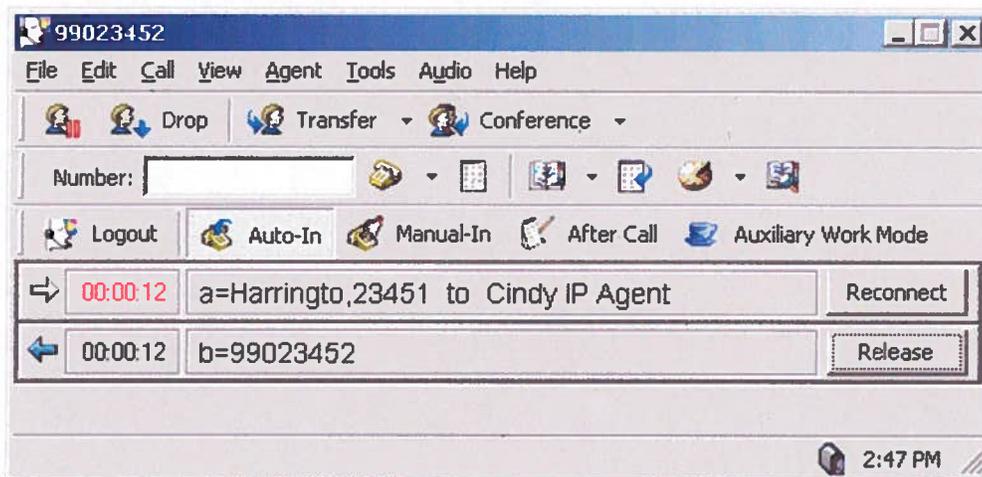
- b) In the new number box enter the number of the party the agent wants to add to the call. (The number must be typed in or it can be copied and pasted in from the contact directory.)
- c) Click **OK**. The caller will be put on hold and the agent will see an **Add the party to the call?** box.



- d) Remain on the line. If the number dialed is answered, the agent may announce the caller and then click on the **OK** button. The display will show **CONFERENCE 2**.



- e) If the number dialed is not answered or is busy, click the **Cancel** button, then click the **Release** and **Reconnect** buttons to return to the caller on hold.



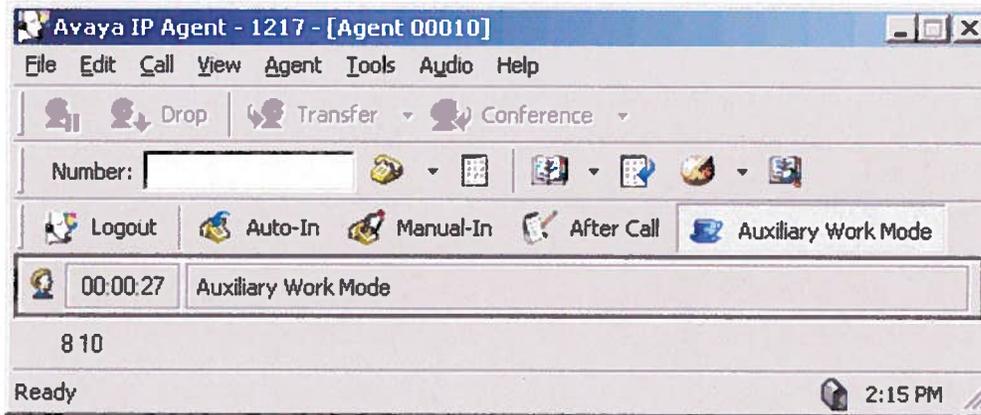
- f) Repeat steps a) through d) until all parties have been conferenced.
g) Any party on the conference call can hang up at any time. The display will show **CONFERENCE X**, where **X** is the number of parties left on the call.
h) To disconnect the last party added to the conference call, click the **Drop** feature.
i) When the conference call is over, click the **Release** feature.

If the agent answered the call using **Manual In**, the system will put the agent in the **After Call Work** mode. The agent will have to become available by using **Step 2** instructions. If the agent answered the call using **Auto In**, the system will automatically make the agent available to take the next call.

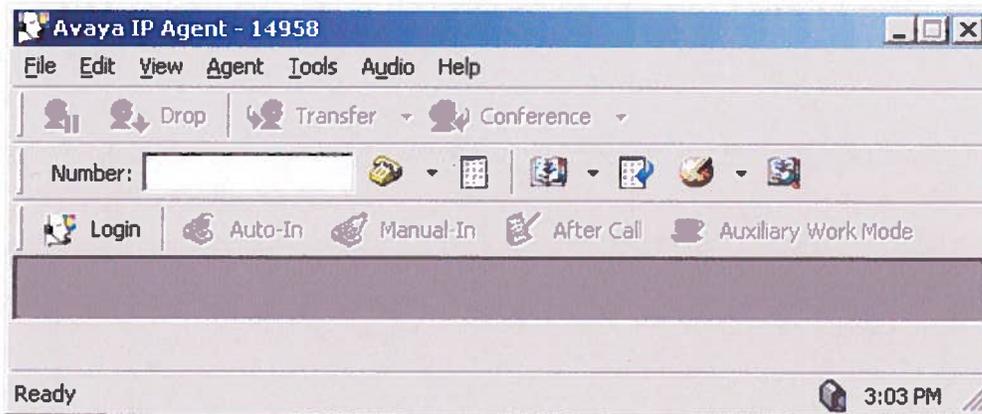
LOGGING OUT

The logout process is initiated when the telephone agent has completed his/her work shift. No additional ACD calls will be sent to the agent and statistical information associated with the agent's workstation is terminated.

TO COMPLETELY REMOVE YOUR WORKSTATION FROM THE ACD:



1. Click the **Logout** button.

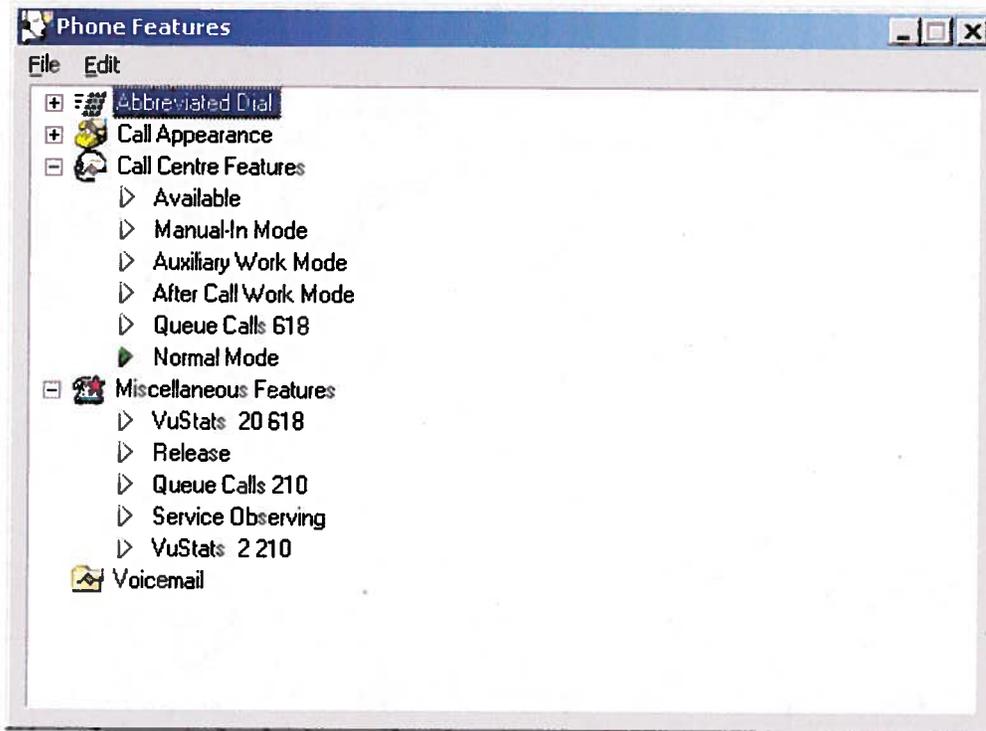


2. Click the **X** in the top right hand corner of the Avaya IP Agent screen.
3. The agent is now **“Logged Out”** of both the ACD and the software.

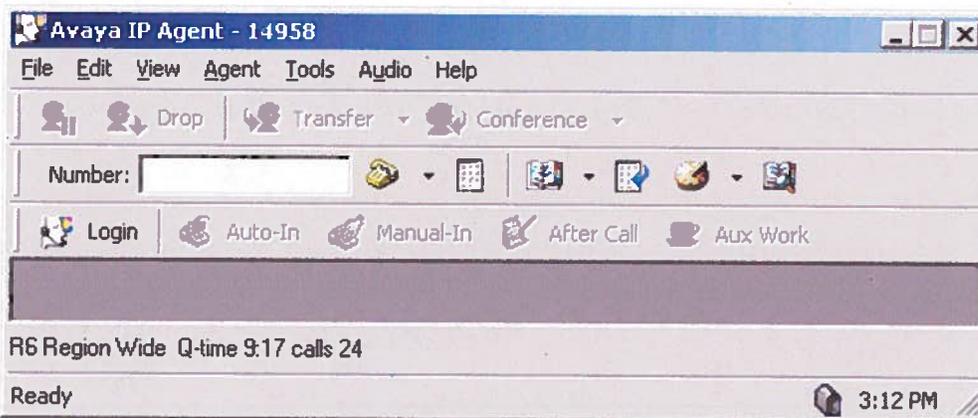
The system will allow incoming calls to wait in queue for the next available Agent. The **Q-Calls/Time** Feature will allow an Agent to display the number of calls waiting and the length of time the oldest call has been holding.

TO DISPLAY CALLS WAITING IN QUEUE:

Click on **Tools** then **Phone Features**. Double click on the **Queue Calls** feature from the phone features window. The number behind the Queue Calls is only an identifier.



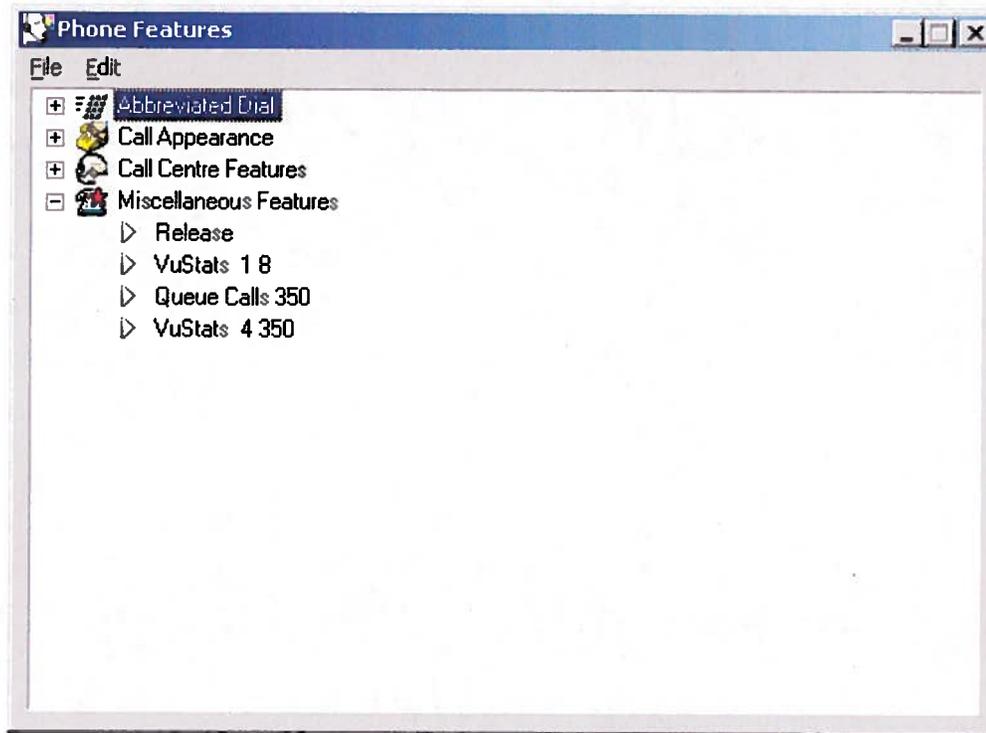
The number of calls waiting and the longest wait period will be displayed near the bottom of the screen. The Queue Calls key can be activated at any time and will remain on the screen for approximately 5 seconds.



Before an Agent opts to notify the system that they will no longer accept calls from the ACD, the Agent should view staffing statistics to determine if the system is staffed adequately to properly service incoming calls.

TO DISPLAY STAFFING INFORMATION:

1. Click on **Tools** then **Phone Features**. Double click on the **VuStats** feature in Phone Features window. The system will display information that has been programmed for viewing.



2. Click on the **Queue Calls** key to clear the display.
3. The **VuStats** key can be activated at any time.

QUICK DIALING

Avaya IP Agent allows the agent to program frequently dialed numbers. Numbers can be found by either opening the Contact Directory window or by typing in the person/business name.

1. Click on the **Contact Directory** icon (two icons to the right from the little yellow phone) or click on **Tools** and select **Contact Directory**.
2. The Contact Directory dialog box will appear.
3. In the Contact Directory menu, if the agent is creating a new entry, click on **File** and select **New**. A screen that looks like an index card with the word **Properties** appears.
4. Enter the appropriate information in the Properties dialog box fields.
5. If the Agent is editing an entry, click on the entry to highlight, then click **Edit** and select **Properties**, make changes in the Properties box and click **OK**.